

DEPARTMENT OF GENERAL SERVICES  
RECORDS MANAGEMENT DIVISION  
**RECORDS RETENTION AND DISPOSAL SCHEDULE**

Schedule No. 1824

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STATE RETIREMENT AGENCY (MSRA)

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1.

**GENERAL ACCOUNTING**

A. Includes all standard State accounting forms as well as other accounting media which provide supporting data for the special and general accounting records. Changes in record format will not necessarily require revision of the retention schedule. However, should the scope and content of a record series be altered, the schedule may be amended to reflect such changes. Each agency will use all or some of the following records which are governed by the indicated retention period:

General ledgers (final monthly ledgers)

Final audit reports

Historical Municipal Corporation data (funding, participation, withdrawal, specific entity correspondence)

Municipal cash flow data (LDATA)

Journal vouchers

Cash receipts listings

Payroll - ETRs

Daily cash summaries and transactions

Penalty and interest billings

Invoices

Banks advices, memorandums, stop payments, returned check reports

Reconciliations

STARS reports

Control logs

Surveys

Payment vouchers and support filed in payment voucher books (see Register Retention Schedule)

Banks Account Reconciliation Reports (ARP)

Filed STARS closing reports

Annual appropriation work sheets

Tax filings (1099R, 945)

Permanent storage. Transfer periodically to the MD State Archives.

Retain three years and until all audit requirements are met; then destroy.

Retain seven years and until all audit requirements are met; then destroy.

Schedule Approved by Department,  
Agency,  
or Division Representative.

Date

Signature

Typed Name GEORGE SAKKAL

Title DIRECTOR, OFFICE SERVICES

Schedule Authorized by State Archivist

Date

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NOV 14 1996

*Edward C. Saperstein*

DEPARTMENT OF GENERAL SERVICES  
RECORDS MANAGEMENT DIVISION  
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B. Register Retention Schedule

Benefit check and advice registers (Social Security Number order).

Maintain registers until annual microfilmed 1099R files are available. Then destroy and maintain microfilm permanently and then periodically transfer to MD State Archives.

Benefit check and advice registers (zipcode/check number order).

Maintain registers for three months subsequent to stale date check notification to Benefits Processing (NOTE: voluntary deduction allocation can be referenced from the cancel and recredit voucher), then destroy.

Employer voluntary deduction reports.

Maintain three month inventory; maintain January reports two additional years, then destroy.

C. Microfilm Documents Retention Schedule

Any document microfilmed may be destroyed the latter of one month or verification of existence on microfilm and no current application usage. A microfilmed stamp on the document is sufficient for verification of microfilming.

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2.

**ADMINISTRATION/OFFICE OF THE EXECUTIVE DIRECTOR**

**A. General Administrative Correspondence**

Letters, reports, memoranda, telegrams, and miscellaneous material which reflect routine operations of the Systems.

Retain in office for two years, then send to the State Records Center. Screen annually and destroy that material no longer needed for current business. Directives, policies, and other material related to the planning and policy that illustrate the development of the agency Retain permanently for eventual transfer to the Archives.

**B. Minutes (Social Security, Board of Trustees, Retirement Systems, State Accident Fund)**

Board of Trustees and executive committee meetings covering the official acts of the agency which report to policy and matters relating to administrative operations and procedures.

Retain permanently; offer to the MD State Archives when they become inactive.

**C. Legislative Files**

Legislation and proposed legislation regarding retirement matters.

Retain for five years, then destroy.

**D. Annual Valuation Reports**

Actuarial valuations completed by actuary annually.

Retain permanently. Periodically transfer to MD Archives.

**E. Technical Actuarial and Official Policies Files**

Contains correspondence and material relating to bulletins issued and financial statements.

Retain in office for five years, then destroy.

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7.31.96  
GEORGE SAKKAL

DIRECTOR, OFFICE SERVICES

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3.

**BENEFITS PROCESSING**

**A. Agency Payrolls and Payroll Information**

Contained in these files are agency payrolls and data processing runs of contributions submitted.

Retain in office for two years after audited, then destroy.

**B. Refund, Transfer, & Miscellaneous Refund Application Files**

Maintain for all members of the Retirement System who have withdrawn their contributions from the Retirement System. This includes: MSRA 5, MSRA 742, MSRA 86, Transactions 509 and 511.

Retain copy in office for two years after fiscal year withdrawn date or until audited. Transfer to the State Records Center for thirty years, then destroy.

**C. Deceased File**

File folders of deceased active and retired members. Contained in these files are:

- Enrollment Card with name, date of birth, beneficiary, & enrollment date.
- History Card - record of contributions and interest for members.
- Retirement Papers - estimate application, retirement application, miscellaneous correspondence from members of the Retirement system.

Retain copy in office for two years after fiscal year withdrawn date or until audited. Transfer to State Records Center for ten years, then destroy.

**D. Retired Member Case Files**

Maintained for all retired members of the Retirement System. This file contains the same material as the active case file and includes any additional correspondence or forms relating to the retired member. This is a microfilmed record.

Retain copy in office for three years and until all audit requirements have been fulfilled; then destroy copy.

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*Edward C. Papenfuss*

11/31/96

GEORGE SAKKAL

DIRECTOR, OFFICE SERVICES

DEPARTMENT OF GENERAL SERVICES  
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	<p><u>E. Refund Transfer Applications</u></p> <p>These are retirement forms authorizing the member's transfer from one of the Retirement Systems to one of the Pension Systems.</p> <p><u>F. Refund Checks</u></p> <p>These are paid checks verifying payment of a member who has withdrawn his/her contributions from the Retirement Systems.</p> <p><u>G. Transfer Checks</u></p> <p>These are paid checks verifying payment of a member who has transferred from one of the Retirement Systems to one of the Pension Systems.</p> <p><u>H. Miscellaneous Letters and Records</u></p> <p>Information used in processing work. Letters of individuals not enrolled as members where there is no member's file to use in attaching information.</p>	<p>Retain in office until microfilmed, then destroy. Retain microfilm permanently. Subject to litigation. Transfer periodically to MD Archives.</p> <p>Retain in office until microfilmed, then destroy. Retain microfilm permanently. Subject to litigation. Transfer periodically to MD Archives.</p> <p>Retain in office until microfilmed, then destroy. Retain microfilm permanently. Subject to litigation. Transfer periodically to MD Archives.</p> <p>Retain in office for three years and until all audit requirements have been met; then destroy.</p>

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4.	<p><b><u>CONTROL DIVISION</u></b></p> <p><b><u>B. Refund Check Registers and Miscellaneous Refund Registers</u></b></p> <p>These are data processing reports which account for refund payments and which give date of payment, name of payee, amount of payments, etc., along with a breakdown of the payment.</p> <p>Refund tabs and reconciliations.</p> <p><b><u>C. Agency Payrolls and Payroll Information</u></b></p> <p>Contained in these files are agency payrolls and data processing reports used in bank statement reconciliations, along with other bank statement related material.</p> <p>Payrolls, tabs, and reconciliations.</p> <p><b><u>D. Active Member Case Files</u></b></p> <p>Maintained for all active members of the Retirement System. Includes member's initial enrollment form together with any other records which may accumulate during a member's period of active membership. Included in these files are:</p> <p>Application for membership (SRA 001) Designation of beneficiary (SRA 004) Proof of birth Application for military service Application for approved leave Correspondence between member &amp; system Any additional information pertaining to member</p>	<p>Retain in office for three years and until all audit requirements are met, then destroy.</p> <p>Retain five years, then destroy.</p> <p>Retain in office one year after audited, then destroy.</p> <p>Retain five years, then destroy.</p> <p>Microfilm. Check quality of film. Retain microfilm permanently in office until member withdraws or is deceased. Subject to litigation. Transfer periodically to MD Archives.</p>

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Date

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Typed Name GEORGE SAKRAL

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*Edward C. Papenfuss*

DEPARTMENT OF GENERAL SERVICES  
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5.

**INTERNAL AUDITING DIVISION**

Workpaper files and computer print-outs from the following units/areas:

- General Accounting
- Administration
- Benefits Processing
- Budget and Procurement
- Control
- Finance
- Information Systems
- Investments Division
- Investments Accounting
- Legislation and Research
- Member Relations
- Office Services
- Special Projects
- Systems Development
- Technical Services

Retain for ten years, then  
destroy.

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6.

**INVESTMENT DIVISION**

**A. General Correspondence Files**

Subject arrangement of original incoming, copies of outgoing letters, memoranda, directives, studies, policies, reports, and other miscellaneous papers relating to the State Retirement Agency of Maryland.

Screen annually. Destroy that material no longer needed for current business. Transfer remainder to the State Archives.

**B. Accounting Records**

- Account Position Appraisals
- Cash Transaction Reports
- Earned Income Reports
- Working Trial Balances
- Dividend and Interest Receivable Reports
- Trade Tickets/Confirmations on Internal Transactions

Retain in office for three years or until audit; then transfer to State Records Center for remaining ten years; then destroy.

6A.

**INVESTMENT ACCOUNTING**

**A. Internally Managed Portfolio Files**

- Documentation and confirmations of purchases and/or sales of stocks, bonds, commercial paper, and other investments:
- Supporting documentation for equity index fund transactions.
- Reference material on securities in internally managed portfolios.

Retain all material in office for five years, then transfer to the State Archives for permanent retention.

Retain three years or until audited, then destroy.

Retain material in office until sale, maturity, or other disposition of asset, then destroy.

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B. Management of Fund Files

- External bond and equity managers
  1. Contracts and State Authorizations
  2. Correspondence concerning contracts
  3. Miscellaneous reports, financial settlements
  4. Performance reports

Retain copies in office for three years after contract expires and all audit requirements have been fulfilled, then destroy.

- Index Fund contains various reports pertaining to specific purchases of sales of stock

Retain all material in office for five years, then destroy.

C. Minute Books

Investment Committee and Ad Hoc Subcommittees - Advise the Board on investment decisions and make recommendations on Investment policies and procedures.

Retain permanently. Transfer periodically to MD Archives.

D. Outstanding Mortgages

File contains the following material on the numerous mortgages held by this Agency.

1. Serving agreements between SIA & servicers
  - Servicers insurance information
  - Schedules of mortgages purchased
  - Commercial loans - current
  - Residential loans - current
  - File cards on commercial & residential loans
- Terminated servicing agreements

Retain in office for three years or until all audit requirements are met, then transfer to the State Archives. Subject to litigation.

2. Mortgages paid in full

Retain in office for three years, and until all audit requirements have been met; then destroy.

Retain in office for three years or until all audit requirements have been met; then transfer to the State Archives for 50 yrs.

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7.

E. Performance Evaluation Service Files

Files consist of various reports pertaining to performance evaluations for each external manager.

Retain copies in office for three years and all audit requirements have been fulfilled; then destroy.

LEGAL DIVISION

A. Attorney General Opinions

Attorney General Opinions and laws governing the State Retirement System are contained here.

Retain permanently. Transfer periodically to the MD Archives.

B. Child Support Liens

Child support lien orders, memorandum, letter(s) and other related documents.

Retain for 50 years. Transfer periodically to the MD Archives. Subject to litigation.

C. Administrative Proceedings - Contested Non-Disability Files

Memorandum, general correspondence, record, transcript of administrative hearing, proposed findings of facts and conclusions of law, ALJ decision, Board of Trustee decision and any supporting documents.

Retain in office for five years, then transfer to State Records for five years, then destroy.

D. Administrative Proceedings - Contested Disability Files

Memorandum, notebook containing record, transcript of administrative hearing, proposed findings of facts and conclusions of law, ALJ decision, Board of Trustee decision and any supporting documents.

Retain in office for two years. Send to State Records for five years, then destroy.

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*Edward C. Saperstein*

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E. Litigation - Contested Disability

Memorandum, notebook containing record, transcript of administrative hearing, proposed findings of facts and conclusion of law, legal research, ALJ decision, Board of Trustee decision, supporting documents, Appellant's Order of Appeal and Petition in Support of Appeal, etc.

Retain hardcopy for five years; microfilm, check quality of film, then destroy hardcopy. Retain microfilm permanently. Subject to litigation. Transfer periodically to MD Archives.

F. Administrative Proceedings - Contested Non-Disability

Memorandum, general correspondence, records, transcript of administrative hearing, proposed findings of facts and conclusions of law, ALJ decision, Board of Trustee decision and any supporting documents.

Retain hardcopy in office for five years. Microfilm. Check quality of film, then destroy hard copy. Retain microfilm permanently. Subject to litigation. Transfer periodically to MD Archives.

G. Litigation - Contested Non-Disability Files

Memorandum, general correspondence, record, transcript of administrative hearing, proposed findings of facts and conclusions of law, ALJ decision, Board of Trustees decision and any supporting documents, Appellant's Order of Appeal and Petition In Support of Appeal, Appellee's Answer to Petition, Certification of Compliance, Certification of Record, notice of filing of transcript and/or record, B12 memorandum and supporting pleadings.

Retain hardcopy in office for two years. Microfilm. Check quality of film, then destroy hard copy. Retain microfilm permanently. Subject to litigation. Transfer periodically to MD Archives.

H. Advice Letters

Advice of Counsel memos are generated by the Legal staff in response to Agency questions regarding various legal issues.

Retain permanently. Transfer periodically to MD Archives.

I. General Correspondence

In-house correspondence that has gone out, requests for information, responses, memorandums as well as back up correspondence.

Retain for five years, then destroy.

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J. Regulations

Policy statements, former regulations, draft regulations, comments on draft regulations, final regulations, general correspondence relating to the promulgation of regulations and the regulatory review plan.

Store in the office for three years; then send to State Records for seven years, then destroy.

K. Contracts

General correspondence, memorandums, release and/or assignment, various charts and computations, research articles, various pleadings, agreement, certificate of incumbency, escrow agreement, corporate resolution and various schedules and exhibits.

Retain for 50 years. Transfer periodically to MD Archives. Subject to litigation.

L. Special Projects

Class action lawsuit - pleadings, affidavits, depositions, deposition schedules, transcripts, general correspondence, memorandums, facsimiles, discovery information, plan proposals, post rulings, ruling and opinion requests, release of information, advices of counsel, remedial legislation, research information and other related documents.

Retain permanently. Transfer periodically to MD Archives. Subject to litigation.

M. Qualified Domestic Relations Orders

True test copy of a qualified domestic relations court order, memorandum, general correspondence, may include a separation agreement and drafts of domestic relations order.

Retain for 50 years. Transfer periodically to MD Archives. Subject to litigation.

N. Administrative Files

Attorney General response file: requests for information from constituents on retirement information, response to requests, memorandums for the AG's office, AG Library information, expense account files, invoices paid, out of state travel preauthorization forms, time sheets for the Legal Office with accompanying forms for leave, compensatory leave, blank time sheets, law clerk time sheets, and other related administrative materials.

Store in office for three years. Retain for 50 years. Transfer periodically to MD Archives. Subject to litigation.

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O. Research, Opinion and Advice

Response to requests for information regarding pension and retirement laws, response to public information requests, sick leave policy, personnel, memorandums, new articles, investment and divestiture information, ADA implementation, estoppel issues, legislative research, disability research, tax issues and any research that is generated by various requests.

Retain permanently. Transfer periodically to MD Archives.

P. Garnishments - State Taxes, Private

Requests for garnishment, court order, general correspondence, memorandum, pleading, pertinent court papers.

Retain permanently. Transfer periodically to MD Archives.

8.

**MEMBER RELATIONS**

A. Medical Board

•Disability Files (726) - files include Statement of Disability, medical documentation of illness, Decision of the Medical Board, Decision from Administrative Law Judges, etc.

Retain for five years; microfilm, check film for quality; then destroy hardcopy. Retain microfilm for 50 years. Subject to litigation. Transfer periodically to MD Archives.

9.

**OFFICE SERVICES**

A. Publications

- Annual Reports
- Mentor newsletter
- Retiree News and Notes newsletter

Retain permanently. Transfer periodically to MD Archives.

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B. Personnel Records

This series applies to Department of Personnel within MD State Government and includes all standard personnel forms as well as other personnel media which provide supporting data for both special and general personnel records.

Retain for three years after termination of employment and then destroy.

1. Upon selection for employment within the State Retirement Agency, either as a new hire, transfer, reinstatement or temporary employee, a personnel folder is prepared. This folder may contain all or some of the following documents:

- Application
- Appointment letter
- Correspondence relating to new appointment
- Personnel payroll form
- Personnel position action request
- Personnel recruitment screening report
- Personnel transaction form
- Retirement form

2. During continued employment, the folder may contain the following documents:

- Change of address forms
- Clearance file
- Charges for removal
- Commendations
- Contractual employment
- Counseling sessions
- Disciplinary actions
- Efficiency ratings
- EOE statistical reports
- General correspondence
- Grievance actions
- Health insurance benefits forms
- Leave forms

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C. Automated Files - Current Year

Microfilm record of each individual member's retirement account for the current fiscal year including service credit, contributions to date, status, enrollment data, etc.

Retain permanently. Transfer periodically to MD Archives.

D. Automated Files - History

This record series is contained in 35 mm microfilm rolls. It is a complete history of each individual member's retirement account by Social Security Number. This file contains the service credit, yearly and total contributions, enrollment data, etc.

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